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Morocco

Citrus

Semi-Annual

2005

Approved by:

Michael J. Fay
U.S. Embassy, Rabat, Morocco

Prepared by:

Aziz Abdelali

Report Highlights:

Preliminary figures indicate higher exports of clementines than earlier forecast. Orange exports are strong and shipments are slightly ahead of last year's pace. FRUMAT, the sole concentrate producer is in bankruptcy indicating that Morocco is likely to become a net importer of juice concentrate.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Semi-Annual Report
Rabat [MO1]
[MO]

Preliminary clementine export figures released by the Export Quality Control Office (EACCE) reflect an increase compared to our earlier estimates (MO4019) because of stronger demand in Europe. The export season for fresh small citrus fruit (clementine and other small citrus fruits) ended at the end of February. Export of oranges are still going on and are still expected to be higher than last year in spite of the unusually cold weather during January-February that generated producers concerns of quality loss. Sources indicated that some citrus trees suffered significantly from the cold and quality has slightly deteriorated but the overall impact on citrus orchards and production is believed to be rather marginal.

The change in export figures in 2002 and 2003 for oranges and Clementines reflect the use of Morocco's official trade figures (Office des Changes). EACCE figures are used as first estimates because they are more timely.

FRUMAT, by far the largest processor and sole producer of concentrate in Morocco closed down and is currently subject to juridical liquidation. Thus, most of the processed citrus today is for production of fresh juice that is mostly consumed locally. In fact, Morocco is expected to continue to import on a regular basis juice concentrate for the local beverage manufacturers.

Morocco negotiated with the EU an increase in its fresh citrus quotas to reflect the enlargement of the EU. The increase in the TRQ for Moroccan clementines entering the EU is small but applies retroactively from May 2004, and resulted in a total increase of about 10% (from 133,000 MT to 143,700 MT). For oranges the increase is smaller as it is only 2.2 % of the previously prevailing quotas (300,000 MT to 306,800 MT).

PSD Table

Country	Morocco					
Commodity	Oranges, Fresh					
	(HECTARES)		(1000 TREES)		(100	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official	Estimate [DA Official]	USDA Official	Estimate [DA Official]	USDA Official	Estimate [New]
Market Year Begin	10/2002		10/2003		10/2004	MM/YYYY
Area Planted	50	50	50	50	51	51 (HECTARE
Area Harvested	49	49	49	49	49	49 (HECTARE
Bearing Trees	15200	15200	15200	15200	15402	15402 (1000 TRE
Non-Bearing Trees	300	300	300	300	300	300 (1000 TRE
TOTAL No. Of Trees	15500	15500	15500	15500	15702	15702 (1000 TRE
Production	800	800	705	705	813	813 (1000 MT)
Imports	0	0	0	0	0	0 (1000 MT)
TOTAL SUPPLY	800	800	705	705	813	813 (1000 MT)
Exports	226	256	237	210	290	290 (1000 MT)
Fresh Dom. Consumption	530	500	466	494	521	522 (1000 MT)
Processing	44	44	2	1	2	1 (1000 MT)
TOTAL DISTRIBUTION	800	800	705	705	813	813 (1000 MT)

Export Trade Matrix

Country Morocco
Commodity Oranges, Fresh

Time Period	Oct./Sept.	Units:	MT
Exports for:	2002		2003
U.S.	22	U.S.	0
Others		Others	
Russia	86012	Russia	75466
Netherlands	42089	Netherlands	30089
Great Britain	37995	Great Britain	25022
France	26651	France	23607
Belgium	21874	Belgium	19625
Lituania	8453	Lituania	12862
Germany	7596	Sweden	3973
Finland	5854	Saudi Arabia	3309
Sweden	5658	Finland	3286
Spain	5283	Spain	2692
Total for Others	247465		199931
Others not Listed	8817		9924
Grand Total	256304		209855

PSD Table

Country	Morocco					
Commodity	Tangerines, Fresh					
	(HECTARES)		(1000 TREES)		(1000 MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official	Estimate [DA Official]	Estimate [DA Official]	Estimate [DA Official]	Estimate [New]	Estimate [New]
Market Year Begin	10/2002	10/2003	10/2004	MM/YYYY		
Area Planted	23	23	24	24	25	25 (HECTARE)
Area Harvested	23	23	23	23	23	23 (HECTARE)
Bearing Trees	6900	6900	6900	6900	6900	6900 (1000 TRE)
Non-Bearing Trees	300	300	300	300	600	600 (1000 TRE)
TOTAL No. Of Trees	7200	7200	7200	7200	7500	7500 (1000 TRE)
Production	478	478	408	408	443	443 (1000 MT)
Imports	0	0	0	0	0	0 (1000 MT)
TOTAL SUPPLY	478	478	408	408	443	443 (1000 MT)
Exports	184	188	200	189	230	250 (1000 MT)
Fresh Dom. Consumption	290	286	208	219	213	193 (1000 MT)
Processing	4	4	0	0	0	0 (1000 MT)
TOTAL DISTRIBUTION	478	478	408	408	443	443 (1000 MT)

Export Trade Matrix

Country	Morocco			
Commodity	Tangerines, Fresh			
Time Period	Oct./Sep.	Units:	MT	
Exports for:	2002		2003	
U.S.	11693	U.S.	1885	
Others		Others		
Russia	54,256	Russia	43583	
France	24,739	France	37002	
Canada	23,654	Canada	22520	
Netherlands	18,709	Netherlands	16843	
Great Britain	13,683	Great Britain	13905	
Lithuania	11,373	Lithuania	12434	
Belgium	5,676	Belgium	8477	
Saudi Arabia	5,373	Sweden	6951	
Germany	5,078	Norway	5490	
Finland	3,495	Saudi Arabia	4905	
Total for Others	166036		172110	
Others not Listed	10230		15279	
Grand Total	187959		189274	

PSD Table

Country	Morocco						
Commodity	Lemons, Fresh						(HECTARES)(1000 TREES)(100
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official	Estimate [DA	Official	Estimate [DA	Official	Estimate [New]	
Market Year Begin	10/2002		10/2003		10/2004		MM/YYYY
Area Planted	1	1	1	1	1	1	(HECTARE
Area Harvested	1	1	1	1	1	1	(HECTARE
Bearing Trees	280	280	280	280	280	280	(1000 TRE
Non-Bearing Trees	10	10	10	10	10	10	(1000 TRE
TOTAL No. Of Trees	290	290	290	290	290	290	(1000 TRE
Production	20	20	15	15	20	20	(1000 MT)
Imports	0	0	0	0	0	0	(1000 MT)
TOTAL SUPPLY	20	20	15	15	20	20	(1000 MT)
Exports	0	0	0	0	0	0	(1000 MT)
Fresh Dom. Consumption	20	20	15	15	20	20	(1000 MT)
Processing	0	0	0	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	20	20	15	15	20	20	(1000 MT)

PSD Table

Country	Morocco						
Commodity	Citrus, Other, Fresh						(HECTARES)(1000 TREES)(100
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official	Estimate [DA	Official	Estimate [DA	Official	Estimate [New]	
Market Year Begin	10/2002		10/2003		10/2004		MM/YYYY
Area Planted	5	5	5	5	5	5	(HECTARE
Area Harvested	5	5	5	5	5	5	(HECTARE
Bearing Trees	1500	1500	1500	1500	1500	1500	(1000 TRE
Non-Bearing Trees	15	15	15	15	15	15	(1000 TRE
TOTAL No. Of Trees	1515	1515	1515	1515	1515	1515	(1000 TRE
Production	10	10	10	10	10	10	(1000 MT)
Imports	0	0	0	0	0	0	(1000 MT)
TOTAL SUPPLY	10	10	10	10	10	10	(1000 MT)
Exports	0	0	0	0	0	0	(1000 MT)
Fresh Dom. Consumption	10	10	10	10	10	10	(1000 MT)
Processing	0	0	0	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	10	10	10	10	10	10	(1000 MT)